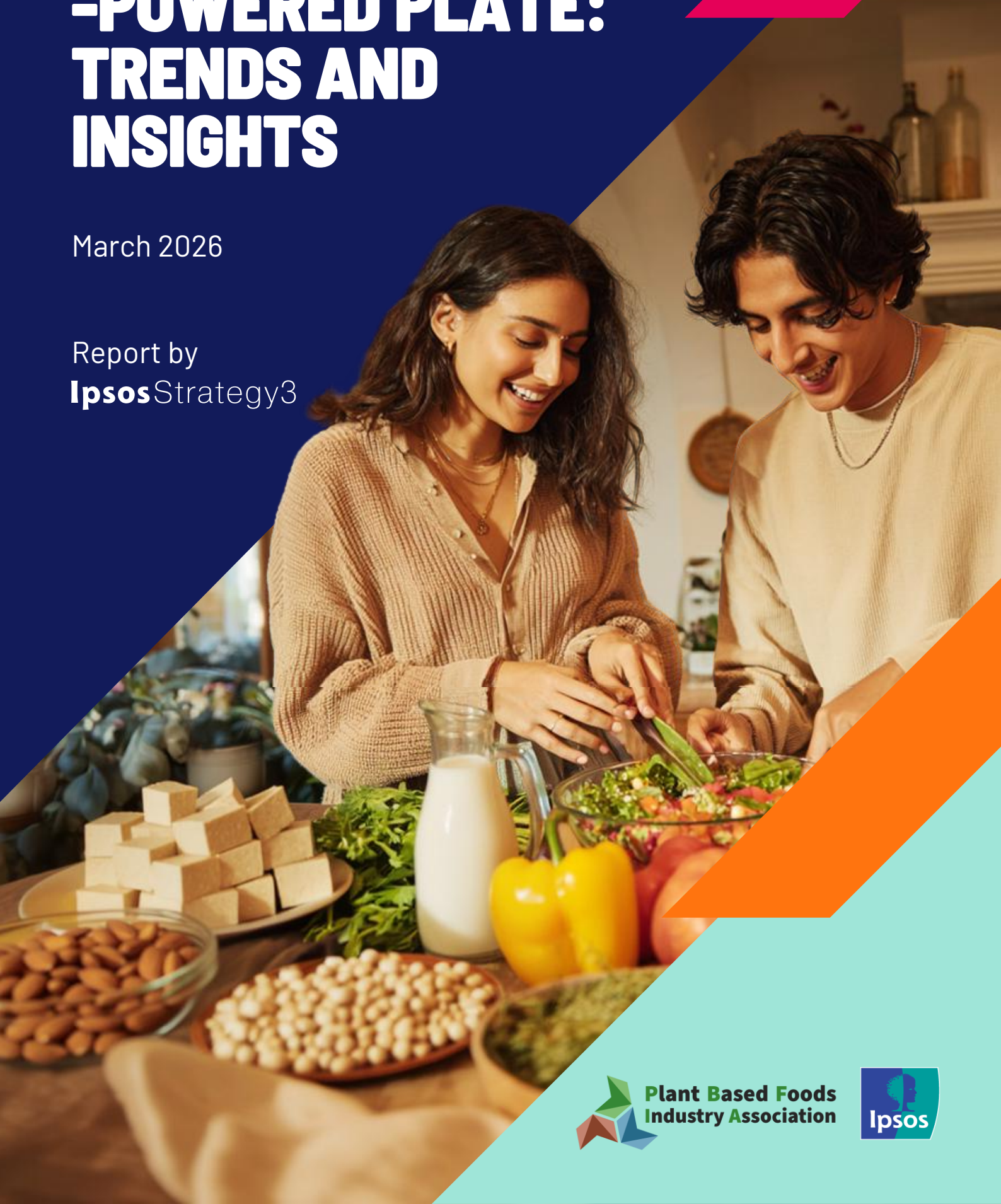


GEN Z AND THE PLANT-POWERED PLATE: TRENDS AND INSIGHTS

March 2026

Report by
Ipsos Strategy3



Plant Based Foods
Industry Association



Foreword

India stands at the cusp of a demographic and dietary transformation. As the youngest major economy in the world, with Gen Z constituting 27% of our population and driving nearly 35% of total consumption spending, this generation is not merely participating in the marketplace – it is reshaping it.

The *Gen Z and the Plant-Powered Plate* report comes at a pivotal moment for India's food ecosystem. It offers critical insights into how young consumers perceive health, sustainability, nutrition, and the role of food in expressing identity and values. What is particularly encouraging for the plant-based foods sector is the strong alignment between Gen Z's priorities and the core strengths of plant-based innovation.

This report clearly highlights that Gen Z views food through a multidimensional lens – where taste, protein, transparency, convenience, and climate consciousness converge. Health is not a trend for them; it is a lifestyle commitment. Sustainability is not rhetoric; it is a purchasing filter. Digital validation is not optional; it is integral. In this evolving landscape, plant-based foods are uniquely positioned to offer solutions that are protein-forward, science-backed, environmentally responsible, and aligned with modern lifestyles.

At the Plant Based Foods Industry Association (PBFIA), we see this generation not just as consumers, but as catalysts for systemic change. Their openness to experimentation, preference for clean labels, demand for authenticity, and willingness to invest in better nutrition signal a long-term structural opportunity for our sector. However, the report also rightly points to areas requiring industry attention – particularly around taste

optimization, affordability, accessibility, and clear communication of nutritional adequacy.

The insights presented here, derived from a robust primary survey and enriched by industry perspectives, provide a strategic blueprint for brands, policymakers, investors, and innovators. To truly unlock the potential of plant-based foods in India, we must collectively focus on education, science-led communication, format innovation, digital engagement, and enabling policy frameworks that support affordability and scale.

As Executive Director of PBFIA, I firmly believe that plant-based foods are not an “alternative” – they are an inevitable and essential pillar of India's future food system. Gen Z's values and behaviours reaffirm this trajectory. The opportunity before us is not only commercial, but also nutritional, environmental, and societal.

I extend my appreciation to Ipsos for their rigorous research partnership and to all industry stakeholders who contributed valuable perspectives to this report. Together, let us build a resilient, inclusive, and forward-looking plant-based ecosystem that meets the aspirations of India's most influential generation.



Praveer Srivastava
Executive Director
Plant Based Foods Industry
Association (PBFIA)



Foreword

Gen Z is not only the country's largest demographic cohort but also its most influential consumer group. With their unique blend of digital fluency, health consciousness, ethical awareness, and experimentation, Gen Z is reshaping the future of consumption in ways that demand close attention from policymakers, industry leaders, and brands alike.

This report, *Gen Z and the Plant-Powered Plate*, brings together deep insights from Ipsos' consumer research and the Plant Based Foods Industry Association's (PBFIA) sectoral perspective to decode how this generation is approaching plant-based food choices. Their preferences are not fleeting trends - Gen Z's relationship with food is holistic: nutrition is tied to physical performance and mental well-being. Food is also a medium of self-expression and identity, and for social and experiential connections.

Our findings reveal a cohort that is remarkably informed and discerning. Eight in ten Gen Z consumers link food directly to health outcomes and functional benefits. They routinely rely on nutrition labels, ingredients, peer reviews, and AI tools to validate their choices. Their openness to plant-based eating is driven by multiple motivations—health benefits, protein consciousness, lactose intolerance, ethical beliefs, and climate concerns. At the same time, they demand authenticity, taste, convenience, and affordability. For this audience, plant-based is not a “substitute”; it is an upgrade—if it delivers on quality and experience.

For industry stakeholders, this signals both a significant opportunity and a clear challenge.

Gen Z is ready to experiment, but not ready to compromise. They reward innovation but expect transparency. They embrace new brands but demand credibility. Their food discovery happens online, yet their loyalty must be earned offline—through taste, trust, and consistent delivery. Quick commerce, digital communities, sustainable narratives, and protein-forward formats will define the next phase of plant-based growth.

As India accelerates towards a more sustainable and health-conscious food future, the plant-based foods sector is uniquely positioned to lead this journey. We hope this report serves as a roadmap for brands, entrepreneurs, investors, and policymakers to align with the needs of this dynamic generation and unlock the immense potential of plant-powered innovation.

The future of food is being shaped today—and Gen Z is leading the way.



Deepak H
Partner and Country Head,
Strategy3
Ipsos India

SETTING THE CONTEXT



Defining the Generations

Boomers
Before 1965

Gen X
1966 - 1979

Millennials
1980 - 1995

Gen Z
1996 - 2012

Age in 2026:
14-30 yrs

Gen Alpha
2013 - 2024

Evolution of Plant-based Foods in India

Pre-2010 Early Awareness Phase



- **Traditional Roots:** India's history of plant-based diets driven by cultural, religious, and regional preferences (Hinduism, Jainism, Buddhism).
- **Focus:** Lentils, pulses, grains, and soya-based products were staples, but limited commercial plant-based alternatives.

2010–2015 Entry of Global Influence



- **Rise of Global Vegan Trends:** Global plant-based movement starts influencing urban Indian consumers.
- **Early Market Entrants:** Soya milk and tofu begin appearing in metros
- **Growth Of Gourmet & Health Food Chains** (e.g., Nature's Basket, Foodhall) that stock imported vegan products alongside domestic offerings.

2016–2019 Growth of Domestic Startups



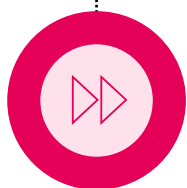
- **Emergence of Homegrown Brands:** Startups e.g., GoodDot, and Urban Platter enter the market.
- **Product Diversification:** Introduction of plant-based meats, almond, and oat milk, vegan cheeses, etc.
- **Slight shift in Consumer Perception:** Rise in awareness around sustainability, and ethical eating.

2020–2024 Acceleration Phase



- **COVID-19 Impact:** Rising health awareness fuels dairy-led growth surge
- **Formation of PBFIA (2021):** To support & promote the sector.
- **Regulatory Developments (2022):** FSSAI issued Vegan Foods Regulations, setting food labeling requirements.
- **Increased Availability:** In supermarkets, select restaurants, and quick-commerce, driven by startups tailoring to Indian tastes.

2025–2035 Transformation Phase



Surge in Plant-based Protein demand: A Transformative Trend

- Growing health consciousness and awareness of plant-based foods
- Plant-based protein powders and bars are gaining wider acceptance among consumers

Research and Development (R&D) efforts are expanding

- The use of plant-based proteins in biscuits, idli-dosa batter, and other snacks.
- Research on plant-based beverages, such as sesame, millet, and more, is gaining momentum.

Transforming Dining & QSR: The Rise of Plant-based Innovation on Menus

- Dining establishments and quick-service restaurants (QSRs) are embracing plant-based innovation by incorporating more plant-based foods and beverages into their menus
- **Vegan Options Surge:** There's a notable rise in the number of vegan restaurants and food outlets

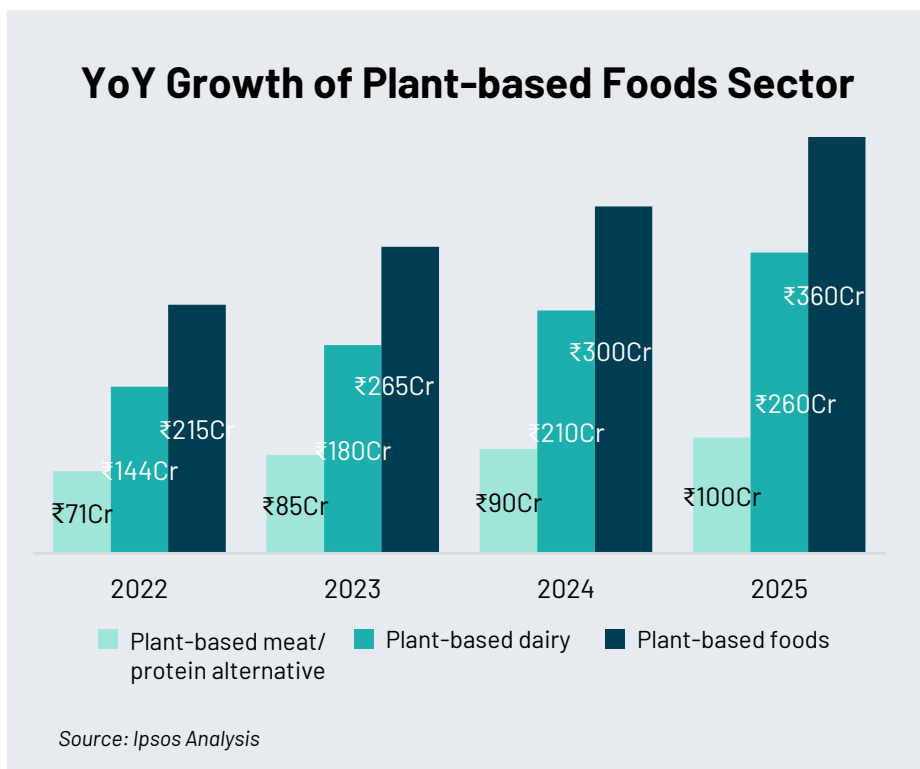


India's plant-based foods industry has the potential to reach ₹ 5,500 crore by 2034

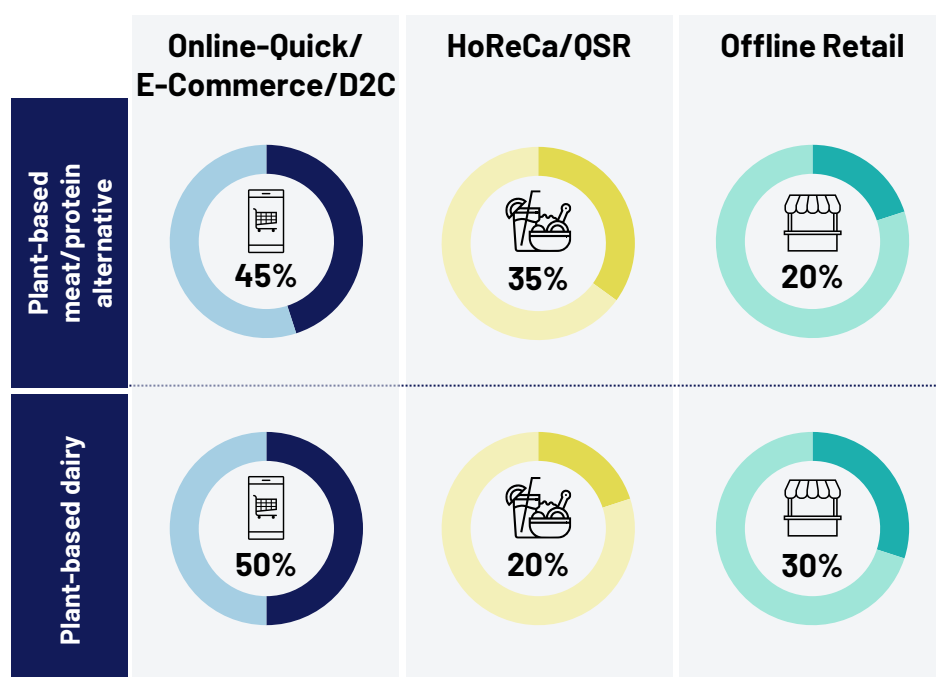
Source: PBFIA- Ipsos Report, 2025
[Sowing the Seeds of Growth: An Outlook on India's Plant-Based Foods Sector](#)

Plant-based Foods Sector Overview

- ✓ The Plant-based foods industry has grown at a 19% CAGR from 2022-2025, riding on the growth of plant-based dairy in India
- ✓ Plant-based dairy industry is growing well year-on-year basis with high acceptance among consumers and growing awareness for Lactose intolerance, Gut and other digestive issues



Online platforms - dominant sales channel driving accessibility



- ✓ Plant-based barista milk is well-accepted in the HoReCa sector for coffee applications
- ✓ The Quick Service Restaurant (QSR) and HoReCa sectors present significant opportunities for the growth of plant-based meat/protein alternatives

Source: Ipsos Analysis based on 2024 market numbers

Source: PBFIA- Ipsos Report, 2025

[Sowing the Seeds of Growth: An Outlook on India's Plant-Based Foods Sector](#)



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1

EXECUTIVE SUMMARY





Executive Summary

As the largest demographic cohort in India, Gen Z drives a significant portion of consumer spending and is shaping consumption trends across various sectors. Characterized as health-conscious, digitally native, and keen on experiential consumption, Gen Z represents an active consumer group and a significant opportunity for plant-based foods sector.

Emphasizing health and nutrition, plant-based foods align seamlessly with Gen Z's priorities. A significant 78% of Gen Z believe in the health benefits of plant-based diets, highlighting the sector's strong alignment with this demographic's lifestyle aspirations. The inclination towards holistic well-being and high nutrition intake, coupled with ethical and environmental consciousness, presents a substantial opportunity for plant-based food brands to innovate and position their products around these values.

Strategically engaging Gen Z requires leveraging digital platforms where this cohort seeks information and community bonding. Engaging content, collaborations with influencers, and transparency in scientific

claims about health and sustainability are critical. This digital savviness is prompted by their constant connectivity, making social media a pivotal tool for driving awareness and engagement.

In capturing this market, brands need to focus on innovative product formats—such as protein powders and snacks—catering to Gen Z's tendency for convenience and quick gratification. Furthermore, pricing strategies that enhance accessibility without compromising on taste or quality will be crucial for overcoming perceived barriers associated with plant-based foods.

In conclusion, plant-based food brands positioned to align with Gen Z's values and consumption habits can capitalize on this significant growth opportunity, meeting their needs and expectations, through communication and positioning that appeals to their individualism at the same time need for social connect.

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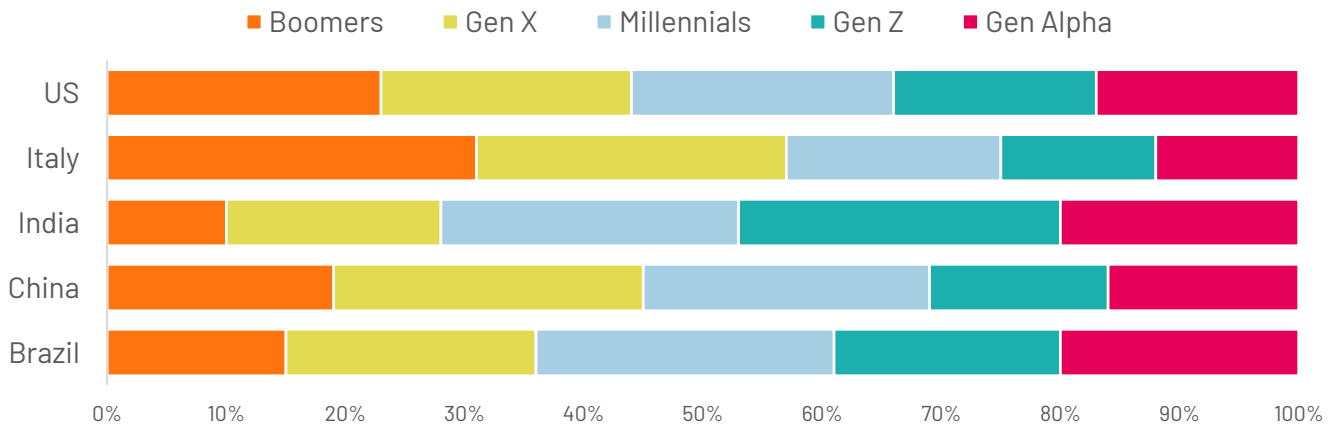
GEN Z SHAPING CONSUMPTION IN INDIA



Gen Z, defined as the generation born between 1996 and 2012, currently makes up the biggest demographic group (at 27% of total population). This makes India one of the youngest countries

in the world, with a median age of 28 years. Gen Z exhibit distinct preferences and behaviour and are shaping consumption patterns across sectors.

Generational breakdown by country

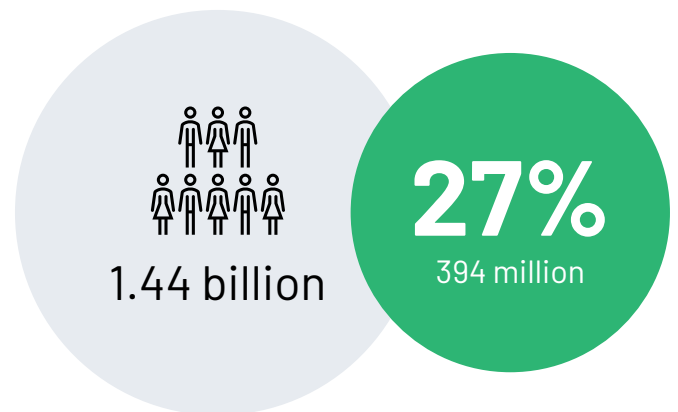


Source: Ipsos Estimates

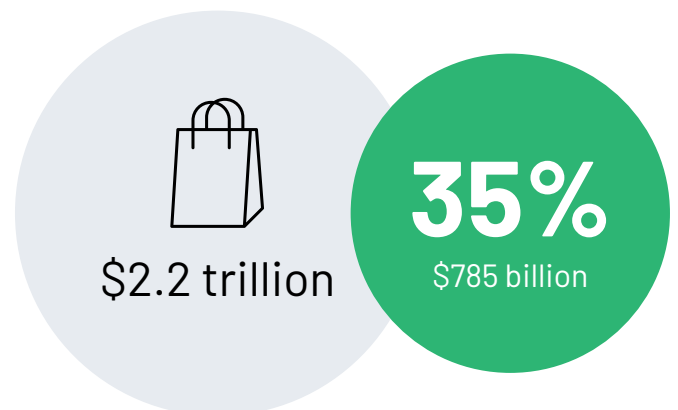
This cohort is high on consumption as compared to previous generations. Currently about 35% of total consumption spending in India is driven by Gen Z, clearly indicating the higher spends when compared to its proportion of the population. No wonder that they are increasingly seen as influential consumers in the marketplace. This generation's unique dynamics and values are prompting brands to refine their marketing strategies to cater to Gen Z's distinct tastes and preferences, given the significant opportunity they present and will be constituting a significant portion of the workforce and earning population in the near future.

Gen Z constitutes 27% of the population, controlling 35% of spends

Gen Z population



Gen Z Consumption Spends



Source: Ipsos Estimates

"Gen Z are open to explore—and the first to move. Today, they're shaping the biggest and most influential buying market"

Yarlagadda Akhila
R&D and Regulatory
Nutrivative Foods Private Limited
(Nourish You)

3

7 TRUTHS ABOUT GEN Z



Many stereotypes have been associated with Gen Z over the years. It is crucial that we not only understand but actively engage with the distinct characteristics and preferences of this generation. This extends to the implementation of tailored communication strategies, product development, and service delivery that resonate with the values and expectations of the cohort, at the same time staying away from generalisations.

With Ipsos’s extensive research of meeting with thousands of Gen Z consumers across sectors, we have compiled certain characteristics which define them and make them distinct from the other generations.

Understanding these traits of today’s Young India is important as a baseline, and in the context of this report’s theme – extending this to Gen Z’s food and beverage consumption habits, and then specifically to what this means for the plant-based foods sector, will help in creating a forward-looking outlook for this industry. Through this framework, we aim to guide key stakeholders within the industry towards capturing and catering to this dynamic and influential segment of consumers.

7 Truths of Gen Z

#1
Health at Forefront

#2
Constant Connectivity

#3
Self Expression and Identity

#4
Rewriting Traditions, Redefining Formats

#5
Experimentative

#6
Instant Gratification

#7
Authenticity

#1 Health at Forefront



Gen Z places significant emphasis on health and self-care, intertwining technology into their routines to maintain their physical and mental well-being. They actively use health-tracking devices such as smartwatches and fitness trackers to monitor key health metrics like heart rate, sleep patterns, and exercise activities. Additionally, apps focused on mindfulness, nutrition, and mental health are prominent tools in their health regimen. This is an informed generation with access to multiple sources to gain knowledge, comfortable with technology, apps and dashboards, and hence more digitally active in health monitoring and self-care.

Their focus on health is not merely a passing fad but an integral part of a broader commitment to overall well-being and longevity (which is not about living longer but functioning longer).

As per the Ipsos Gen Z Survey (details in the Survey Methodology section), 78% describe themselves as “health-conscious” and 79% say prioritizing my physical health is a significant part of my daily routine. As food and diet have a direct impact on health (80% agree), Gen Z are not just conscious about exercise regimes, but also about health food trends. Protein is the new buzzword, with many tracking their daily protein intake. There are clear indications about changing beverage consumption trends as well- towards low/ no alcohol drinks and gut- friendly drinks like kombucha. For them, drinking less alcohol means opting for a lifestyle that feels healthier, intentional and trendier. In essence, the generation’s approach to health and nutrition is holistic.



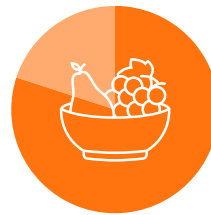
78%

Describe themselves as health conscious



79%

Say prioritizing my physical health is a significant part of my daily routine



80%

Think there is a strong link between overall health and the food we eat

Source: Ipsos Gen Z Survey, 2026



“Among Indian Gen Z consumers, plant-based milk adoption is rising rapidly, driven by growing health consciousness, lactose intolerance awareness, and increasing exposure to global food trends.”

Rohit Baggat

Country Head

Life Health Foods India Private Limited

#1 Health at Forefront



Aligning with their pursuit of physical and mental well-being, our survey findings underscore their recognition of functional benefits from food such as fitness, energy, and mental focus, indicating Gen Z's holistic view towards nutrition for well-being. Functionality is becoming a baseline expectation – they are constantly on the lookout for foods that offer “more.”

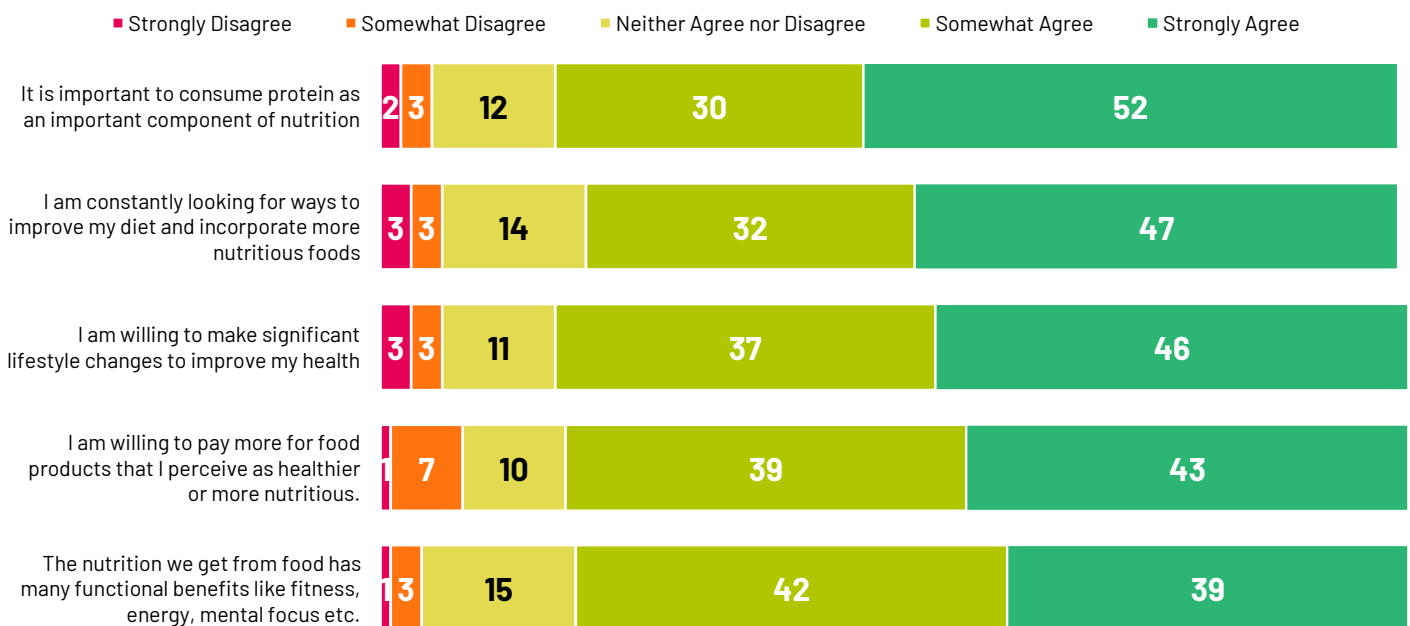
79% are looking to improve their diets, suggesting an ongoing quest for knowledge about foods and their benefits. And with 83% ready to make significant lifestyle shifts, Gen Z showcases a deep commitment to long-term health benefits rather than short-term fads.

Even with limited disposable incomes (as compared to older generations), they are willing to pay more for food products which they perceive as healthier or more nutritious—indicating a readiness to invest in personal health, reflecting trust in products that signal quality and health benefits.

“With Gen Z we are seeing a shift from ‘plant-based is boring’ to ‘plant-based should be better’. They question ingredients, protein, and processing, and reward brands that are honest and science led.”

Ms. Aarohi Surya
CEO, Dancing Cow

Importance of nutrition and healthy diet for Gen Z



Source: Ipsos Gen Z Survey, 2026

#1 Health at Forefront



Implications for Plant-based Foods Sector:

Given Gen Z's focus on health, and the impact of diet and nutrition directly on mind and body fitness, plant-based foods are well positioned to offer what they need – food that shapes and ensures their wellbeing.

Gen Z's perception of plant-based diets is overwhelmingly positive, reflecting a strong belief in the health benefits and efficacy of these foods. With 78% agreeing that a plant-based diet is health-promoting, it highlights Gen Z's recognition of the nutritional and health advantages this diet offers. Furthermore, 73% believe that if well-planned, plant-based diets can provide adequate proteins, emphasizing a shift from traditional protein sources to more sustainable and ethical alternatives. The belief in the disease prevention and treatment potential of plant-based diets, supported by 73%, aligns with the

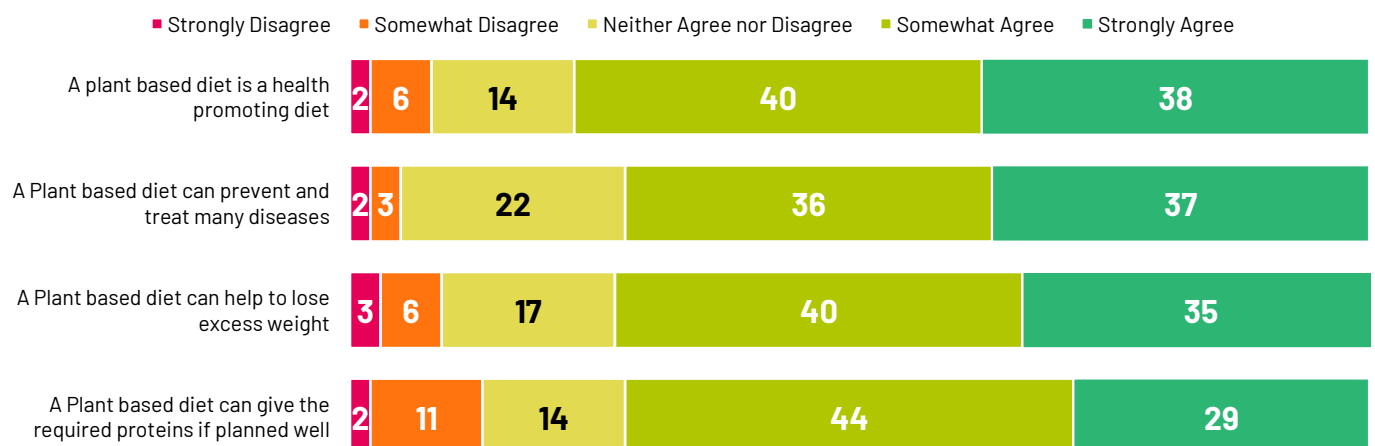
generation's inclination toward preventative health measures and holistic well-being. Additionally, with 75% viewing plant-based diets as a means to manage weight effectively, it suggests Gen Z's openness to incorporating such diets for achieving health and fitness goals.

“Gen Z’s behavioral patterns are characterized by a flexitarian approach, high environmental and health consciousness, and strong reliance on social media for product discovery. They view plant-based options as a sustainable lifestyle choice and a “cool” alternative, with a high willingness to try new, innovative products.”

Ms. Monalisha
Sr. Marketing Manager
Blue Tribe Foods

Positive Perceptions of Plant-based Food among Gen Z

3-in-4 consider it to be health promoting

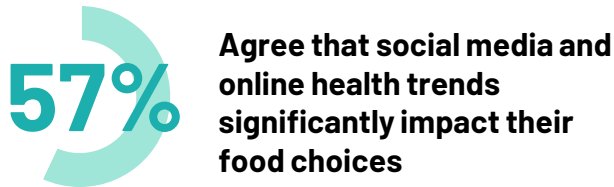


Source: Ipsos Gen Z Survey, 2026

#2 Constant Connectivity



Gen Z are true digital natives, or rather social media natives, having grown up entirely in an era of smartphones, high-speed internet, and social media. The 'oldest' Gen Zers were only 7 years old when Facebook was launched. Technology is second nature to them, seamlessly integrated into every aspect of their lives, from content consumption to online shopping and career exploration. They are highly adaptive to technological changes and comfortable with virtual relationships and global communities.



Source: Ipsos Perils of Perception Survey; Ipsos Gen Z survey, 2026

Ipsos research¹ indicates 30% Gen Zs spend more than 2 hours per day on social media, and another 30% spend 1-2 hours per day. 52% Gen Z say they get news and information from social media feeds, much higher than Millennials and Gen X. Additionally, they spend a significant amount of digital time on channels beyond traditional social media, such as OTT/CTV, podcasts, music streaming, and blogs.

In the context of food consumption, deciding where to eat next and what to eat is greatly influenced through social media. 57% say that social media and online health trends significantly

impact their food choices. Clicking and posting photos of food they are eating, either cooked by self or while eating out, and sharing with friends.

It is safe to say social media is playing a significant role in shaping Gen Z's food choices. Discovery, and validation, are both happening online, leading to experimentation and trials. While influencers are an important part of this online influence, reading the comments and reviews below the online content gives them the "real" information. Authentic peer signals (in the form of posts, comments and reviews) matter more than polished brand claims.

Implications for Plant-based Foods Sector:

Digital presence and buzz is extremely important to tap into this audience. Discussions around plant-based diets and veganism are gaining traction online, driven by influencers and health coaches. Creating digital communities, collaboration with Gen Z influencers, interactive and engaging online content – at the same time communicating the right messages, will be important to create a positive buzz and induce trials for this "always online" audience.

"Gen Z doesn't see plant-based food as a switch. In fact they see it as a lifestyle upgrade. They want protein-forward, great-tasting, easy-to-use products that fit into fast, digital-first lives and reflect their values around health, fitness, and sustainability. Brands that feel modern, convenient, and authentic win their loyalty."

Debabrata Das
Co-Founder, ProMeat

1. Ipsos Perils of Perception Survey, 2024

#3 Self Expression and Identity



Gen Z believe everything they do (be it related to fashion, food, lifestyle) reflects their image to the world. They are extremely socially driven about the image they convey – “*how I come across!*” They need to know the latest trend in fashion, OTT, food etc. in order to keep up with the world, else they will miss out (FOMO- Fear of Missing out being an important keyword in their vocabulary). Their life is for the world to see- so the image they convey is very important. At the same time, they are conscious about their personal style, rather than being just fashion followers. They will pick up trends, but personalise them to suit self, and want style to reflect their individual personality.

Everything about me reflects "me" as an individual, be it my clothes and footwear, or what I eat.

Since even small details are posted online, content around food consumption also needs to reflect a certain image. Visual appeal, uniqueness, and personalisation come into play and plays a role in this expression of their identity and their choices. Since food and where/what they eat is an essential part of lifestyle, it is also made available for the world to see.

Implications for Plant-based Foods Sector:

Innovative food items and recipes, which make Gen Z stand out, and appeal to their sense of individuality and uniqueness can be a key hook. Creating “fun” and “unique” experience around plant-based food products will act as a pull for inducing trial among this cohort.

The Gen Z Spirit : Dynamic and Driven

socially conscious cultural-remixing instant
no-rules FOMO inclusive tech-savvy
mindful break-free curious
experimentative self-expression
identity personalized adaptable
digital-presence innovative unique
authenticity trends





#4 Rewriting Traditions, Redefining Formats

Gen Z are defined uniquely in their drive to break away from and simultaneously reshape cultural traditions. This generation is redefining cultural practices to fit their current lifestyles, demonstrating a blend of respect for cultural roots coupled with a desire for modern relevance, also referred to as “*cultural remixing*”. They are comfortable with remixing culture, rather than rejecting it, retaining their Indian roots and adapting it as a citizen of the world.

They are not dismissing traditions but are actively engaging with and reinterpreting them in innovative, eclectic ways. 67% prefer adapting traditions to suit their own perspectives².

Gen Z is distinguished by their willingness to challenge the status quo and redefine societal norms to align with personal values and current trends. This impacts their routines, where flexibility is preferred over adherence to traditional schedules. Their immediate decisions are at times based “in the moment,” depending on their mood and occasion.

A simple impact of this on food consumption behaviour is the change from traditional three meals a day to multiple moments of consumption (MoC) spread through the day. Also diet formats have been re-packaged from the traditional meals eaten by their parents and grandparents to more modern formats, in keeping with the current fads. And hence the rise of snacking, mini-meals and new formats – not always junk but meaningful.

Also, they are re-imagining old formats for modern contexts like bhajan clubbing and fake weddings. For them, the social and experiential context matters. They are reclaiming traditional practices with modern convenience, retaining their culture and roots, and at the same time trying to shed any associated baggage.

Acknowledging this trend to seek experience in a social setting, restaurants are organising coffee and matcha raves. It has also been observed that “Theme - based” food events work in attracting Gen Z crowds. Or alternately activations/ pop ups linked to popular Gen Z events are also a crowd puller – example being how MTR adopted a pop culture approach at Delhi’s Comic Con by creating relatable superheroes as mascots.

Implications for Plant-based Foods Sector:

Activations and collaborations, finding communication spots and pop-ups at food events can help in building awareness and create an offline buzz, directly targeting this cohort. Brands which can bring people together around their product will be better able to capture the imaginations and loyalty of young people. Also, DIY workshops appeal to Gen Z – many new formats like ‘Sip and Paint’ etc are emerging around this. The plant-based food sector could organise cooking workshops to show versatility of how to use/ cook with plant-based food products.

2. The \$2 Trillion Opportunity- How Gen Z is Shaping the New India - BCG Report



#5 Experimentative

This generation is willing to experiment and try new brands and new fads. Brand loyalty has reduced, and adaptability and curiosity to try something new has increased. They even challenge heritage/ legacy brands trusted by their parents and instead look for emerging/ newer brands – 70% Gen Z agree that “new brands are fun”. They are open to Indian brands (promoting “Made in India”) and new emerging brands/ small entrepreneurs. For them, it is not a given that international brands will be good. They are open to alternatives – same composition/ benefit offered through another brand.

Regarding food consumption, this automatically translates to trying different cuisines and different/ new types of food products. They are flexible in their approach – will change preferences depending on the context and occasion of consumption.

Implications for Plant-based Foods Sector:

This creates an opportunity for emerging brands to carve a niche, and appeal to the “many moods” of Gen Z. Trial barriers are lower—but retention and loyalty need to be earned. Brands can build trust with the right messaging – the audience is already willing to experiment. Industry Stakeholders can promote Indianness of the brands to tap into the openness to embrace new startups. Also, smaller SKUs should be made available to induce trial – in smaller packs, they are willing to buy premium products as well. Additionally, use the right communication language on packaging as a hook.

New flavours, and mood-based positioning (example when feeling low, try this new flavour on the go) could create a hook for trial.



% of Gen Z saying “new brands are fun”

Source: Ipsos Gen Z Survey, 2026





#6 Instant Gratification

This generation is growing up in the world of convenience and availability "on demand" - be it OTT or food delivery or quick online shopping. Further accentuated by the pandemic, the convenience of quick availability as and when the heart desires is now a hygiene expectation rather than a luxury.

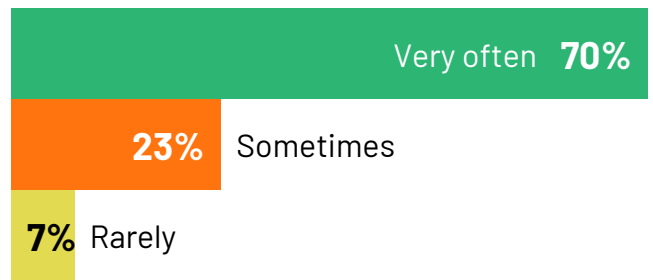
Expectedly, incidence of online shopping in Urban India is highest among Gen Z (at 30% incidence as compared to 23% among Millennials and 19% Gen X³). Gen Z (and early Millennials) also comprise the biggest customer base for the popular Q com platforms. Not surprisingly, 70% of Gen Z in our survey claim to buy food and beverage products very often from Q com apps like Blinkit, Zepto, Swiggy Instamart etc., higher among the older/ working Gen Z population (75%), and among females (74%) as compared to males (65%).

3. Clicking into the Future - Ipsos Report on Online Shopping Trends

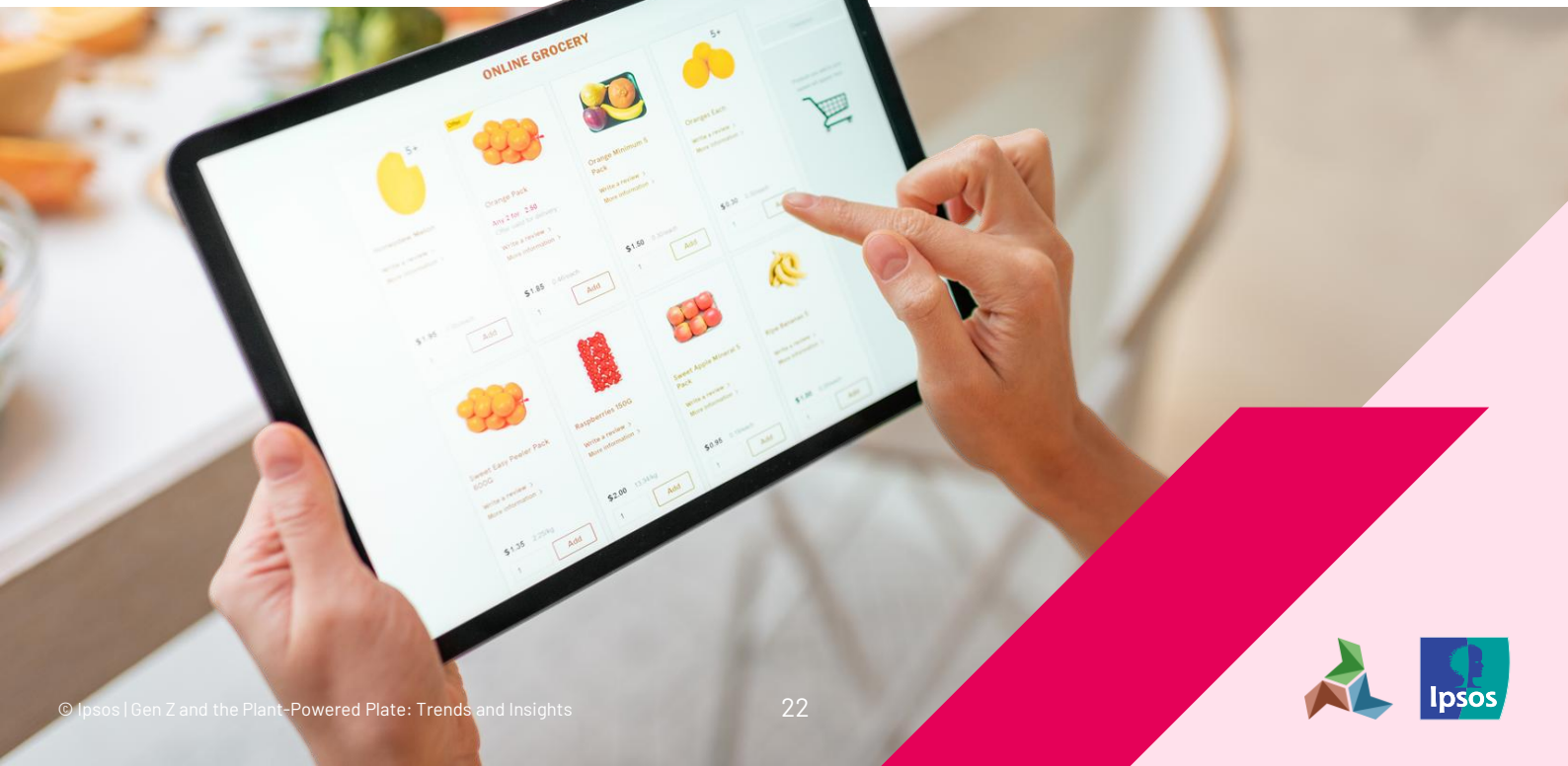
Implications for Plant-based Foods Sector:

Availability on Q com apps is a must to be able to tap into this audience, it automatically translates into credibility for the brand. As Ipsos research on online shopping trends³ shows, stock outs = lost opportunity as well as lost trust. For targeting Gen Z, digital first activation strategy is key.

Frequency of purchasing F&B products online from Q -comm apps



Source: Ipsos Gen Z survey, 2026





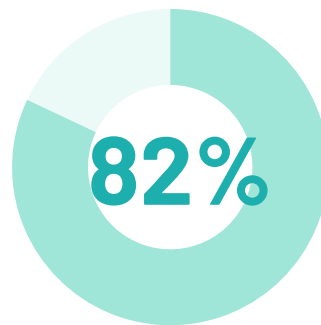
#7 Authenticity

They believe in science backed claims. Window dressing does not work with Gen Z. They are curious, and back it up with information (online medium being their main source of information). They are much more aware of terms and ingredients- and use ChatGPT for further validation (by uploading ingredients and nutrition labels mentioned on back of pack of beauty or food products on ChatGPT to interpret and explain it.) For them, information is available at the click of a button, and comfort with AI makes the task easier. 75% say they use ChatGPT regularly for daily tasks.

Our survey shows 82% Gen Z regularly read nutrition and ingredient labels when purchasing food products. It's safe to say that they are **"discerning consumers"** - hence only adding "Nutrient" labels to legacy food brands can create skepticism. They prioritize product quality over brand reputation, value over visibility, and are willing to switch brands if better alternatives emerge. They scrutinize claims and question value, demanding transparency and ethical standards.

Implications for Plant-based Foods Sector:

Brands can build in a clear health related benefit backed by science. Clear communication of nutrient information and associated benefits, which should also be conveyed through the packaging, is important. Keep the message simple. Given the buzz around veganism and growing awareness of lactose intolerance among Gen Z, the sector is placed in a unique position of offering actual science backed claims on nutrition and health benefits.




% of Gen Z saying "I regularly read nutrition and ingredient labels when purchasing food products"

Source: Ipsos Gen Z survey, 2026

I click photo of the pack label and ask ChatGPT to interpret for me



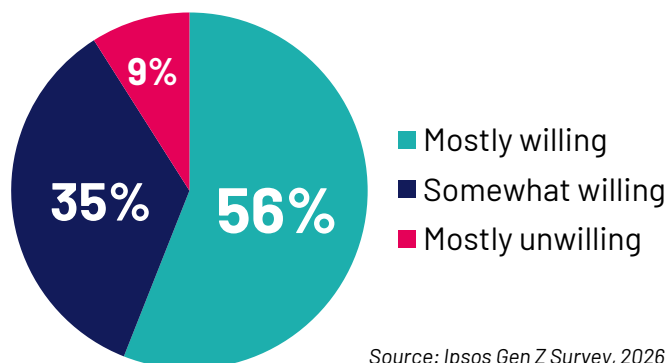
Gen Z Traits and impact on the Plant-based Foods sector

Gen Z Trait	Food Consumption Behaviour	Impact for plant-based foods sector
 <p>Health at Forefront</p>	<ul style="list-style-type: none"> • Health conscious and self aware – monitor health metrics through health apps • Aware of impact of food and diet on health, hence healthy food and nutritious diet matters – with a focus on gut health 	<ul style="list-style-type: none"> • Positioning on health and nutrition • Buzzwords like protein, gut health, lactose intolerance resonate with Gen Z
 <p>Constant Connectivity</p>	<ul style="list-style-type: none"> • Online discovery and validation • Food decisions influenced by reviews, comments, peer validation and not just influencers • Eating is performative and shareable - clicking and sharing photos of food being consumed 	<ul style="list-style-type: none"> • Digital Engagement with Gen Z <ul style="list-style-type: none"> ○ Digital Communities ○ Interactive and engaging online content
 <p>Self Expression and Identity</p>	<ul style="list-style-type: none"> • Food as an expression of identity • Visual appeal matters • Uniqueness and personalisation 	<ul style="list-style-type: none"> • Build “for me” narrative • Unique and innovative food concepts
 <p>Rewriting Traditions, Redefining Formats</p>	<ul style="list-style-type: none"> • Multiple moments of consumption (MoC) • Snacking, mini-meals and new formats • Social experiences matter 	<ul style="list-style-type: none"> • Pop-ups/ activations/ collaboration at events • DIY cooking workshops
 <p>Experimentative</p>	<ul style="list-style-type: none"> • Low loyalty, high curiosity • Trial barriers are low • Willingness to try emerging local brands 	<ul style="list-style-type: none"> • Innovative formats and new flavours • Induce trial through smaller SKUs
 <p>Instant Gratification</p>	<ul style="list-style-type: none"> • Convenience as a hygiene, not a luxury • High reliance on quick commerce and delivery platforms - ordering food and beverage for their self-consumption 	<ul style="list-style-type: none"> • Presence and availability on Q-com is a must. Availability = credibility while Stock-outs = lost opportunity and lost trust • Provides scope for micro-targeting
 <p>Authenticity</p>	<ul style="list-style-type: none"> • Ingredient-aware, label-reading, AI-assisted validation • Science backed claims on packaging 	<ul style="list-style-type: none"> • Transparency builds trust – packaging, and clear nutrition labelling, is important • Health related benefit backed by science

In conclusion, our survey reveals promising potential for growth for the plant-based foods sector among Gen Z consumers. With 56% already willing to try plant-based foods, there is a substantial group of early adopters who can serve as trendsetters, influencing their peers. Additionally, 35% are open to trying plant-based foods but need the right push through targeted marketing efforts.

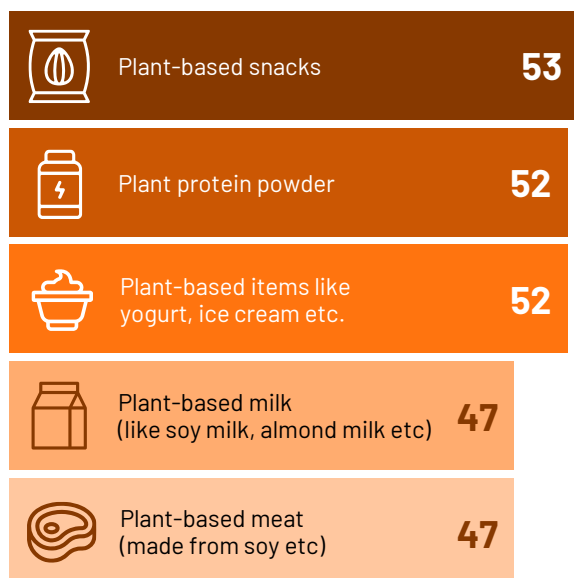
But clearly, the choices revolve around plant-based protein powder, and innovative formats like snacks and ice cream.

More than 1-in-2 Gen Z willing to adopt Plant-based Foods



Source: Ipsos Gen Z Survey, 2026

% willing to try



Source: Ipsos Gen Z Survey, 2026

The insights suggest that a variety of factors influence Gen Z's interest in plant-based foods. Health-related triggers, such as a need to increase protein intake (40%), doctor recommendation (28%) and conditions like lactose intolerance (19%), are significant motivators. Social influences from family, friends (29%), and social media (30%) also play a critical role, so does the modern/ trendy association (38%). Ethical considerations, such as concerns over animal welfare (35%) and climate change (34%), also resonate with this cohort, demonstrating their environmentally and socially conscious mindsets.

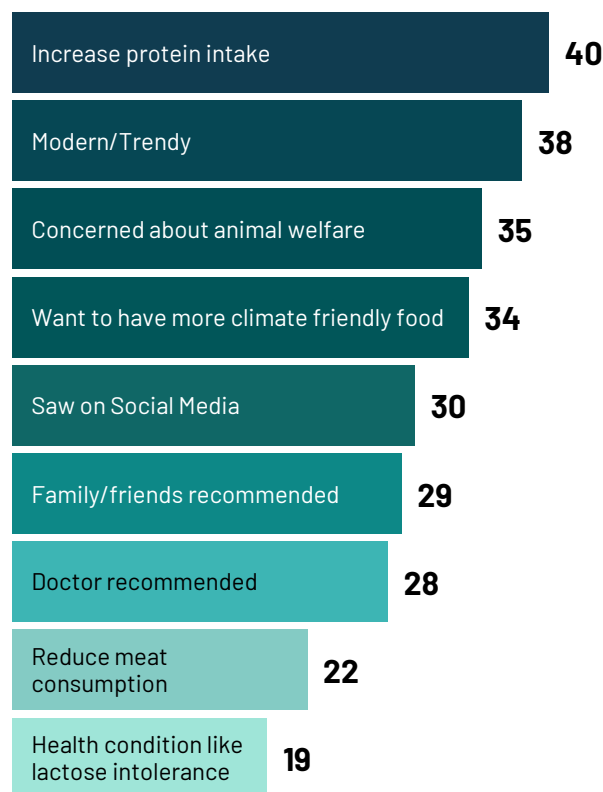


“Gen Z approaches plant-based foods less as a dietary identity and more as a practical, value-driven choice that fits into everyday eating. Their food discovery journey is largely digital, shaped by creators, peers, and short-form content, with taste remaining non-negotiable, health being an expectation, and sustainability at times a strong driver of decisions. This combination of values, convenience, and openness to flexible consumption makes Gen Z a strong long-term growth opportunity for plant-based brands.”

Malavika Siddharth
Co-founder and Nutritionist
Hello Tempayy

Health considerations, WOM influence and sustainability are key triggers

% saying...

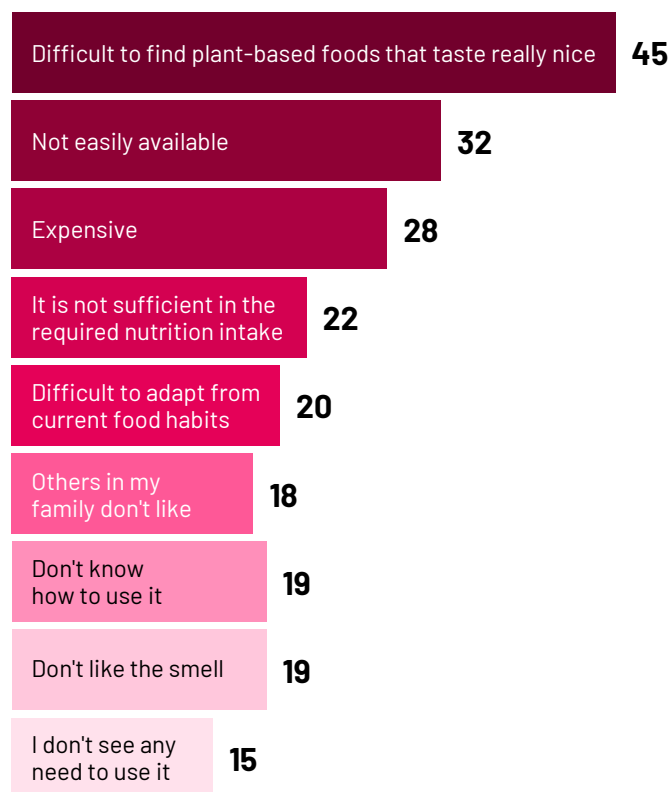


Source: Ipsos Gen Z Survey, 2026

However, the concerns surrounding plant-based foods among Gen Z highlight several challenges and opportunities for improvement in this sector. A significant portion (45%) finds it difficult to find tasty plant-based options, indicating a need for products that prioritize taste alongside health benefits. Additionally, issues of accessibility and availability are notable, with 32% saying plant-based foods are not easily available. Cost is another barrier, as pointed out by 28% who perceive these options as expensive. Adaptation difficulties are highlighted by 20%, who find it challenging to change from existing eating habits, and 18% who are influenced by family preferences. Concerns about nutritional sufficiency (22%) point towards educational opportunities to communicate the completeness of well-planned plant-based diets.

Taste, availability, affordability and adaptability are key concerns

% saying...



"Taste remains a top priority for Gen Z; if a plant-based product does not taste good, it will not be repurchased."

Ms. Monalisha

Sr. Marketing Manager, Blue Tribe Foods

"Gen Z is actively seeking sustainable, healthy products from purpose-driven companies. Plant-based products meet these criteria far better than their animal-based counterparts.

With supportive regulatory and structural changes, plant-based products can overcome one of their biggest hurdles: price competitiveness. That would unlock the sector's potential by orders of magnitude."

Jinal Shah

The Vegan Marketer

Older Gen Z and females have a more positive outlook towards health and plant-based foods

	Top Box Scores (%)	ALL	18-25	26-30	Male	Female
Health and Nutrition Focus	I describe myself as very health conscious	36	31	42	34	38
	Prioritizing my physical health is a significant part of my daily routine	37	31	44	37	38
	I think there is a strong link between overall health and the food we eat	50	43	56	47	52
	It is important to consume protein as it is an important component of nutrition	52	46	59	55	50
	I regularly read nutrition and ingredient labels when purchasing food products	46	38	54	41	51
	The nutrition we get from food has many functional benefits like fitness, energy, mental focus	39	36	43	36	43
	Social media and online health trends significantly impact my food choices	26	21	31	24	28
Adaptability	I am willing to make significant lifestyle changes to improve my health	46	40	51	42	50
	I am willing to pay more for food products that I perceive as healthier or more nutritious	43	40	47	42	45
	I am constantly looking for ways to improve my diet and incorporate more nutritious food	47	41	54	45	50
Positive Perception to Plant-based Foods	A plant-based diet is a health promoting diet	37	33	42	36	39
	A plant-based diet can give the required proteins if planned well	29	22	36	27	30
	A plant-based diet can prevent and treat many diseases	37	34	39	35	38
	A plant-based diet can help to lose excess weight	35	33	37	31	38
	Plant-based foods reduce my environmental impact	28	24	33	26	31
	A plant-based diet avoids animal cruelty	42	39	44	38	46
	Willing to buy plant-based foods	56	52	60	47	65

Source: Ipsos Gen Z Survey, 2026

A Green Future: Promoting Sustainability and Animal Welfare

"The move of Gen Z individuals to eat more plant-based foods is motivated by a desire to show empathy towards animals, but is further supported by the taste, nutrition and positive sustainability footprint of plant based foods."

Mr Abhishek Sinha
CEO, GoodDot

"My Future, My Food,
My Choice, My Planet"

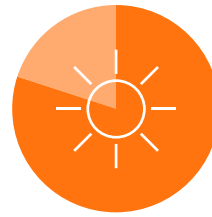
Vikas Patil
Founder Director, Mirtillo International

"Gen Z are informed consumers choosing vegan, plant-based products with a anti-animal cruelty and sustainability mindset."

Yarlagadda Akhila
R&D and Regulatory
Nutrivative Foods Private Limited
(Nourish You)

"Gen Z understands the link between food, climate, and ethics far better than previous generations. Studies across India, the UK, and Europe show their willingness to adopt plant-forward choices is closely tied to broader sustainability behaviours - with 78% prioritising brands aligned with social or environmental causes, making them the strongest long-term market for responsible, plant-based innovation."

Shreya Ghodawat
Sustainability Strategist & Climate Activist



80%

Concerned about the environment and the impact of climate change



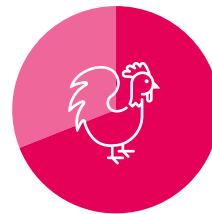
82%

We need to follow a more sustainable lifestyle



75%

Plant-based foods reduce my environmental impact



69%

A plant-based diet avoids animal cruelty

Source: Ipsos Gen Z Survey, 2026



4

WAY FORWARD: MARKETING TO GEN Z



In conclusion

Gen Z's food choices are shaped by a complex interplay of health aspirations, ethical values, climate awareness, convenience, cost sensitivity, and digital influence. Food is no longer just nourishment—it is a lifestyle signal and a form of self-expression. Protein has emerged as a “lifestyle currency” for this generation, associated with fitness, energy, cognition, and preventive health, yet nutrition literacy around protein quality, bioavailability, and balance remains uneven. While Gen Z actively seeks protein-forward foods—particularly in formats like snacks, ready-to-drink beverages, QSR meals, and ready-to-eat products—there is limited understanding of plant-based protein sources, clean-label formulations, and fortification strategies. Taste continues to be a primary purchase driver, often outweighing labels and sustainability claims, but transparent nutrition labelling and “clean” ingredient lists increasingly influence trust and repeat purchase, especially among urban consumers.

There are clear opportunities and tasks for plant-based food industry stakeholders looking at targeting Gen Z as potential audience. Brands must navigate this landscape by redefining engagement strategies for this audience.

- **Digital-First Is Non-Negotiable:**
A robust online presence is a must, ensuring seamless access to credible information, brand engagement and purchase options.
- **Beyond Just Healthy:**
Given the health and nutrition focus, build on communication addressing these needs, specially about protein intake. Going a step ahead, position plant-based foods as a holistic lifestyle choice that aligns with Gen Z's need for identity, experience, and social standing, making it more than just a dietary choice.

- **Design for Trial, Not Loyalty First:**
Induce trial by building on their experimentative nature, and for their many moods, and earn loyalty basis positive experience with the product taste/quality and memorable experiences.
- **Make Science Simple & Visible:**
Transparency in ingredients and nutrition through pack labels, underpinned by credible science-backed claims, is essential in garnering trust among Gen Z consumers.
- **Win Moments, Not Pre-defined Meals:**
Innovate occasions beyond traditional meal times, tapping into spontaneous needs like mood upliftment and social events.
- **Blend Online Reach with Offline Experiences:**
Harmonize online marketing with offline engagement through experiential events like tastings and samplings, making plant-based foods accessible and familiar.
- **Innovative Formats:**
Snacking and mini – meal formats are likely to appeal to this cohort. Along with this, plant – based protein powder has high potential.
- **Specific targeting:**
Gen Z is not a homogenous group as a target audience – the older “working” Gen Z are earning and have higher willingness to pay. They are also more health conscious and have a more positive perception for plant-based diets. Females are more positive towards plant-based foods than males. Targeting specific groups through the right communication strategy will have higher returns.

Clearly, what Gen Z is looking for:

- *Help me make choices that balance my nutrition and budget goals*
- *Make it easy for me to understand how my food choices affect my health, my community and the planet*
- *Help me create low-effort social moments centered around mealtimes*

At the same time, the opportunity comes with its own challenges that marketers need to be cognizant of:

- Health is a doorway to enter, but conveying clarity of ingredients/benefits and building personal relevance are critical
- Building brand loyalty and long term retention will be a challenge, given their experimental nature. There may be low barriers to induce trial, but sustaining this over a long term rather than just a current fad will require constant innovation and engagement
- Their flexible mindset and “in the moment” lifestyle makes occasion based marketing more difficult, as their purchase and consumption varies by their current mood
- Plant based foods have traditionally had barriers around taste, availability and affordability⁴, concerns voiced by Gen Z as well.

Food brands targeting Gen Z must navigate a complex landscape where health, sustainability, and convenience intersect. As this demographic continues to mature, their attitudes towards food, particularly plant-based options, will likely evolve.

Gen Z is not merely a passive consumer; they are actively reshaping the future of plant-based foods. Brands that resonate with their mindset will successfully transition plant-based options from niche appeal to mainstream acceptance, redefining food culture in young Gen Z India.

4. Sowing the Seeds of Growth- PBFIA-Ipsos Report, 2025

“India’s Gen Z is open to questioning the status quo and is investing in making more conscious choices. To win with this cohort, we must stop viewing plant-based as an ‘alternative’ and start seeing it as the inevitable future of food by making it accessible & appealing.”

Amy Aela

Co-Founder, Pause Mumbai;
Podcast Host, Kindness with Amy

“Gen Z is redefining plant-based food in India—they don’t compromise on taste, but they do care deeply about ingredient integrity, transparency. What we see with Gen Z is a clear shift from ‘healthy versus indulgent’ to ‘better indulgence.’ They expect plant-based products to taste great, feel modern, and be easily accessible through digital and quick-commerce platforms.”

Rahul Mittal

Founder, Granos & Noirdate



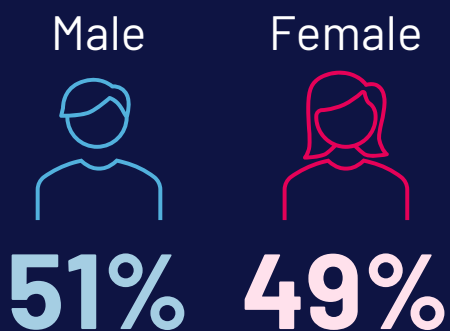
Survey Methodology

We conducted a primary survey among 500 Gen Z consumers to understand their attitudes and perceptions towards health, nutrition and plant-based foods. The survey was conducted online using the Ipsos Digital platform, among 18-30 year old population, residing in urban India.

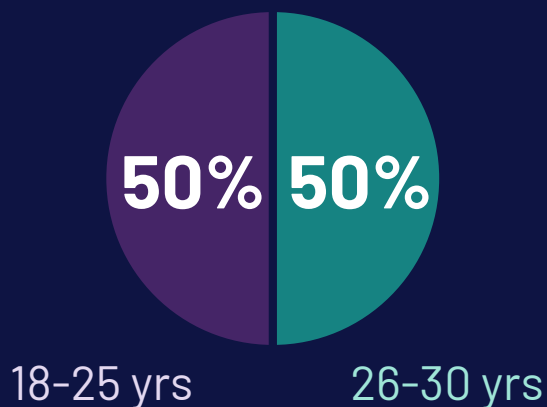
The respondents were a mix of vegetarian (25%) and non-vegetarian (75%), and a majority (93%) claimed to be involved in the shopping for food items (including snacking) for self-consumption.

Profile of respondents covered in the survey is given below.

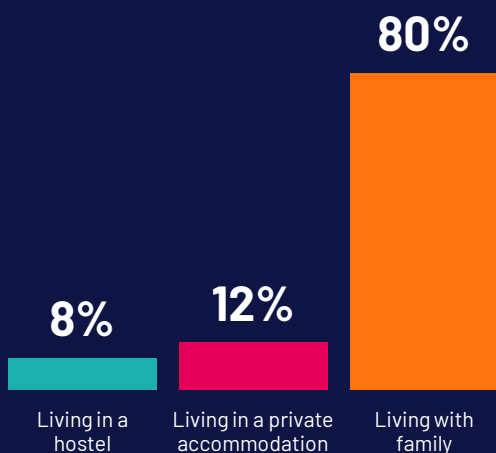
GENDER



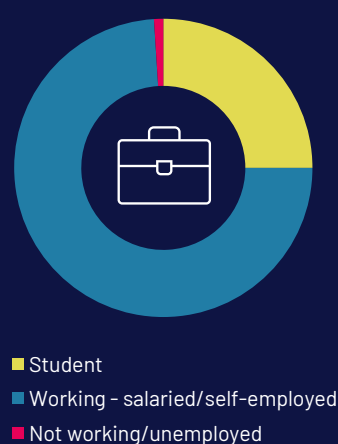
AGE



CURRENT LIVING ARRANGEMENTS



OCCUPATION



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